



# **TRAINER TOOLKIT**

**Putting the Pieces Together**



**October 2013**

# TOOOLKIT

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# Introduction

## Purpose

There are many things to consider when planning, designing, developing, delivering, and evaluating a training program. This Trainer Toolkit will guide you through the steps and enable you to:

- ✚ Select the best format
- ✚ Address all the planning details
- ✚ Design your program following the ADDIE model and adult learning principles
- ✚ Write clear objectives for the program
- ✚ Use effective training aids
- ✚ Set up an environment conducive to learning
- ✚ Present with confidence
- ✚ Evaluate the effectiveness of your presentation and the program

## Target Audience

The Trainer Toolkit is designed for anyone who needs to impart information to others. It is for those who have a presentation to make, are facilitating or presenting at a training event, are teaching a course, or are developing a complex training program. It will be useful to the novice or experienced trainer.

## Structure

The Trainer Toolkit is organized following a basic training cycle – Plan, Design, Develop, Deliver, and Evaluate.

In the Planning and Organizing section you will find information about selecting the best format and a checklist summarizing the information a trainer needs when planning. Under Design, Development and Delivery, you will find information about good program design techniques, learning styles and teaching techniques, objective writing that relates to the program, lesson planning for quality delivery, effective use of training aids, designing a learning environment that works, and presentation skills that make you look like a professional. In the Evaluation and Improvement Implementation section you will find guidance on the steps of the basic evaluation process and several sample evaluation questionnaires to inspire you as you create your own. Lastly, Additional Resources provides information on the Americans with Disabilities Act, Section 508 Compliance, Continuing Education Credits, the Area Health Education Centers, and Satellite Broadcasts.

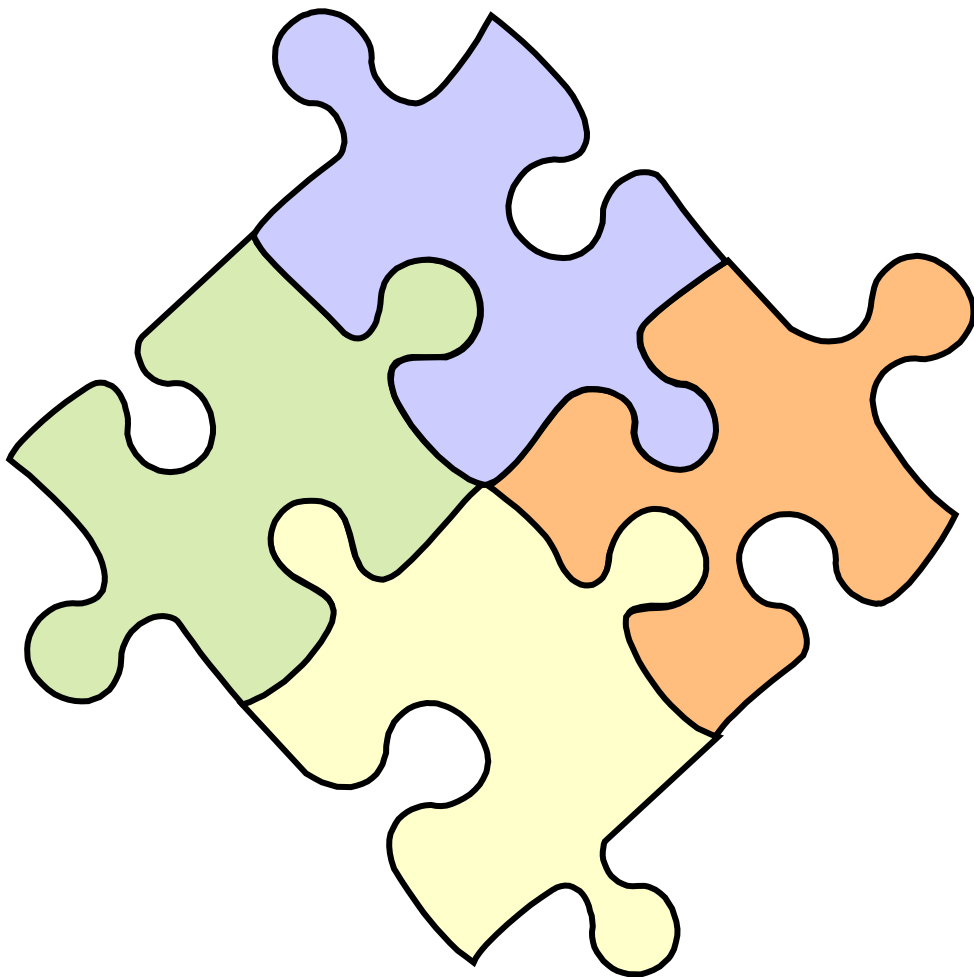
## Uses

The Trainer Toolkit is designed as a resource guide in which trainers can find information on topics of their choosing. Trainers may also find it helpful to study the Toolkit in its entirety. While it is available in an electronic format, it may also be useful to print a copy for easy access.

This resource provides a brief overview of the wealth of information available to help people improve their training skills and provide effective training. You are encouraged to continue studying additional resources from the many experts in the field.

For more information contact the Florida Department of Health, Bureau of Preparedness and Response at [PHMP\\_TrainEx@doh.state.fl.us](mailto:PHMP_TrainEx@doh.state.fl.us).

# PLANNING AND ORGANIZING



## Training Method Considerations

When planning a training event, one of the first decisions to make is about the training method. Basic training methods commonly fall into one of two types, classroom training or independent study.

- Classroom training includes classes with an instructor and a group of participants in the same room, such as training events, conferences, and programs that involve skill demonstration.
- Independent study includes classes with individualized reading materials, computer / web-based training, webinars and other mobile learning programs.

Often, the optimal learning experience can be a combination of computer-based / independent study and classroom training.

There are several factors to consider when determining the best method for delivering training.

- Current technology proficiency and confidence level of participants
  - Importance of practice and immediate feedback to the intended learning outcome
  - Development deadlines and budget
  - Numbers of employees in the target population
  - Geographical distribution of target population
  - Measurement tools to assess learning outcomes
- (Charney, C. & Conway, K., *The Trainer Tool Kit*, 2005)

Classroom Training	Independent Study
<ul style="list-style-type: none"> <li>• Current technology proficiency and confidence level of participants</li> </ul>	
Classroom training can be done without technology, but typically requires trainer access to, and proficiency with, presentation equipment based on the types of media used. Participants do not need to be proficient with technology, except when it is the subject of the training.	Independent study classes can be done without technology, but typically requires student access to computers and proficiency with the computer program or application used. Trainers need to be skilled at operating the equipment and computer programs / applications.
<ul style="list-style-type: none"> <li>• Importance of practice and immediate feedback to the intended learning outcome</li> </ul>	
Trainers can incorporate a variety of teaching methods to address the learning needs of the participants. Practice activities and immediate feedback from the trainer can easily be included. Participants benefit from observing and interacting with others. This requires more classroom time, but is often the most effective way to learn. Curriculum content can be modified on the spot, as needed and as appropriate for the class.	Independent study is most commonly used with awareness level (informational) training. There is no interaction with a group or trainer unless used in conjunction with classroom training. Practice activities and feedback are often included in the form of scenarios or quizzes with built-in explanations to responses. Sophisticated applications may enable the use of a variety of teaching methods. Curriculum is delivered in a standardized fashion; modifications to the computer class must be made by the appropriate staff / vendor.

<ul style="list-style-type: none"> <li>Development deadlines and budget</li> </ul>	
<p>The length of time to develop and deliver the program can vary depending on whether it is developed in-house or by an outside vendor, on its complexity, and / or on the number of classes offered. A vendor can be costly, but can be more efficient in reference to staff time. Complex courses can take more time and require greater expertise of staff / vendor. The greater the number of classes offered, the greater the cost. A significant amount of time is needed for administration and set up. Typical costs include curriculum development, printing of materials, facility and equipment rental, trainer expenses, and participant travel.</p>	<p>Length of time to develop and deliver the program is basically dependent on whether it is developed in-house or by an outside vendor and the complexity of the technology. In-house development can be faster if staff have the time and skills to develop course materials and use computerized course development tools. Vendors can have the needed course development skills and the time to devote to the project, but may be more costly. Cost does not increase with additional classes, typically. Classes involve some administration time, but little, if any, set up time. Typical costs include curriculum development and any initial technology cost. There is usually a lower per person cost than classroom training.</p>
<ul style="list-style-type: none"> <li>Numbers of employees in the target population</li> </ul>	
<p>The number of people trained is limited by the size of the facility, the number of classes, the ability of the trainer and participants to travel and the cost of travel. Classes vary in length, from as little as an hour up to a week or more. In order to receive credit participants are required to attend for the entire block of time. Scheduling can be challenging.</p>	<p>These types of classes allow more people in more locations to be trained in less time. Courses generally require less time per session and often allow participants to end training sessions and return at their convenience. Participants complete training on their own and verification methods can be implemented by the computer system and / or appropriate staff. Participants can also review training content when needed.</p>
<ul style="list-style-type: none"> <li>Geographical distribution of target population</li> </ul>	
<p>When training is provided across a large area, the number of classes may need to be increased to limit the distance staff are required to travel. Location of training space, printing and transport of materials, advertising, registration, and other logistical tasks need to be completed for each venue.</p>	<p>Since individualized classes are typically computer / web-based, the geographical location of staff is generally not problematic, except where computer access is limited or the computer program / application of the class is not available.</p>
<ul style="list-style-type: none"> <li>Measurement tools to assess learning outcomes</li> </ul>	
<p>Numerous evaluation methods and tools can be used to measure participant learning and trainer and class effectiveness.</p>	<p>Individualized classes are usually limited to quizzes and evaluation surveys, based on the capability of the computerized course program / application. Trainer observation of participant skills is not possible, unless done apart from the class.</p>

Source: Adapted from *The Trainer Tool Kit*, Charney, C. & Conway, K. 2005

# Training Event Planning Checklist

## Steps to consider when planning a training event:

### PLANNING / ANALYSIS

- ☐ Develop and conduct a needs assessment to determine the need for a training event.
- ☐ Outline budget and secure resources. Consider hard and soft costs for the following suggested categories:

Administration	Room rental
Program development	Presenter fees / expenses
Materials & supplies	Travel Costs
Printing / CD production	Other expenses
Software / license	

If requesting Public Health and Healthcare Systems Preparedness (PHHP) funding, ensure project is in alignment with the PHHP Strategic Plan and approved through the appropriate capability team. (see Strategic Planning at <http://www.floridahealth.gov/preparedness-and-response/preparedness-planning/index.html>)

- ☐ Identify the purpose and desired outcome for the training event.
- ☐ For PHHP related events, identify response roles and applicable course programs. (see Preparedness Training Catalog at [http://www.floridahealth.gov/preparedness-and-response/training-exercise/\\_documents/php-training-catalog.pdf](http://www.floridahealth.gov/preparedness-and-response/training-exercise/_documents/php-training-catalog.pdf))
- ☐ Determine knowledge, skills or abilities to be gained and develop clear training objectives.
  - S – Simple
  - M – Measurable
  - A – Achievable
  - R – Realistic
  - T – Task Oriented
- ☐ Determine agencies / programs to be involved, who will develop and lead, and how responsibility will be assigned.
- ☐ Determine the target audience and their needs; consider their knowledge and skills, any special interests, biases, behaviors, and reasons for attending.
- ☐ Determine number of participants and how they will be invited.
- ☐ Determine method(s) of presentation (face-to-face, online / web-based, CD / DVD, webinar, blended learning).
- ☐ Determine amount of time needed and agenda / lesson plan.
- ☐ Determine Continuing Education Units (CEU) source, requirements, and procedure (if CEUs will be provided).
- ☐ Determine registration fee and method of collection (if any).

- ☐ Determine evaluation process.
  - Instrument design (within Learning Management System (LMS))
    - Course effectiveness – achievement of objectives, student knowledge & skill, job applicability, accuracy of content
    - Participant satisfaction & recommendation
    - Instructor effectiveness
  - Data analysis
  - Application of results
- ☐ Determine location, secure appropriate facility, and negotiate costs (if any). Consider parking issues and Americans with Disabilities Act (ADA) accessibility requirements.
- ☐ Determine availability of overnight accommodations for participants (if needed).
- ☐ Decide if and how refreshments will be provided.
- ☐ Verify availability of audio-visual equipment and technical support.
- ☐ Identify and notify people to assist with logistics during the training event.
- ☐ Identify and coordinate with presenters.

## DESIGN AND DEVELOPMENT

- ☐ Determine best way to capture the event in the electronic Learning Management System (LMS) (i.e., TRAIN-Florida). Communicate with the appropriate system Course Manager.
- ☐ Develop curriculum and materials, working closely with contracted curriculum developer, if applicable. Ensure a variety of appropriate learning strategies are incorporated.
- ☐ Consider the needs of any participant with a disability when developing learning content and activities.
- ☐ Design any tests to be used, focusing on measurement of competence and ability.
- ☐ Design the evaluation instrument (s), to include the extent each objective was met.
- ☐ Peer Review and Approval: Ensure the finished draft of all course material is reviewed by the Program Manager and an independent third party subject matter expert (someone outside supervisory chain of command and project team).
- ☐ Ensure Program Manager completes the online review form and emails supporting materials to [PHMP\\_TrainEx@doh.state.fl.us](mailto:PHMP_TrainEx@doh.state.fl.us) before the submission deadlines for the review.
- ☐ For projects supported with PHHP funds, complete the Tier Review Process for approval and make modifications as recommended.  
(see Curriculum and Exercise Review; *Review Process Documents and Links* at <http://www.floridahealth.gov/preparedness-and-response/training-exercise/exercisereview.html> )
- ☐ When all course components are developed and approved, as needed, create the course in the LMS. Follow the steps for course creation specific to the LMS.



## IMPLEMENTATION AND EVALUATION

- ☐ Create / send event announcement / invitation, to include:

Event sponsor	Cost (if any)
Name of event	Agenda / program highlights
Who should attend	Presenter information
Location	CEU information
Date and time	Registration information

- ☐ Reproduce materials for the training event and determine method of dissemination.

Training manuals  
Individual handouts  
Testing materials  
Participant folders and labels  
Name tags  
Sign-in sheets  
Evaluation forms  
Certificates (to be filled in based on attendance and course completion)  
Registration, travel, and other forms, as needed

- ☐ Secure audio-visual equipment and supply needs and ensure they are operational:

Training materials and supplies used by participants (name tags, pencil, paper, etc.)  
Laptop computer with needed programs, CD / DVD drive, USB ports, speakers, etc.  
Presentation on travel drive, CD / DVD, VHS tape, other visual or audio media  
LCD projector  
TV / VCR / DVD player  
VCR / DVD with LCD connection  
Extension cord / power cords  
Flip charts and stand(s)  
Dry erase / white board  
Markers (flip chart and dry erase)  
Other miscellaneous trainer supplies

- ☐ Arrive early, allowing enough time for required preparation.
- ☐ Meet with facility coordinator / security personnel to confirm arrangements.
- ☐ Post directional signs.
- ☐ Arrange furniture to encourage interaction, based on type of training event. Ensure participants will be able to see and hear the presentation. Consider needs of participants with disabilities.
- ☐ Connect and check audio-visual equipment for proper functioning.
- ☐ Locate heat / AC and lighting controls. Locate restrooms and telephones to inform participants.
- ☐ Display resource materials, as applicable.

- ☐ Organize registration area (if any). Distribute training event materials and evaluation forms at registration or in the classroom.
- ☐ Set up refreshments, if any, and water for presenter(s) and participants.
- ☐ Meet with training event facilitator(s) to review tasks and answer questions.
- ☐ Complete all preparations before the first participant arrives.
- ☐ Start and finish the training event on time. Monitor timing and flow of the activities, being alert to participation and participant needs.
- ☐ Distribute certificates of completion at the end of the session or mail to participants.
- ☐ Collect participant evaluation forms.
- ☐ Return furnishings to proper places and dispose of all trash appropriately.
- ☐ Disconnect and store all equipment and gather remaining materials.
- ☐ Remove meeting signs and check out with facility coordinator / security.
- ☐ Send letter of appreciation to presenters and others, as appropriate.
- ☐ Compile and analyze evaluation results, prepare summary report, determine and implement next steps for improvement.
- ☐ Share evaluation results for individual sessions with session presenter; submit summary report to your supervisor or others, as appropriate.

Source: Adapted from *Handbook for Trainers*, Florida Department of Health, September 2003

# Online Training Event Planning Checklist

## Steps to consider when planning an online training event:

### PLANNING / ANALYSIS

- ☐ Develop and conduct a needs assessment to determine the need for a training event.
- ☐ Outline budget and secure resources. Consider hard and soft costs for the following suggested categories:
  - Administration
  - Program development
  - Software / license
  - Other expenses

If requesting Public Health and Healthcare Systems Preparedness (PHHP) funding, ensure project is in alignment with the PHMP Strategic Plan and approved through the appropriate capability team. (see Strategic Planning at <http://www.floridahealth.gov/preparedness-and-response/preparedness-planning/index.html>)
- ☐ Identify the purpose and desired outcome for the training event.
- ☐ For PHHP related events, identify response team(s) and course program(s) to which it is applicable. (see Preparedness Training Catalog at <http://www.floridahealth.gov/preparedness-and-response/training-exercise/documents/php-training-catalog.pdf>)
- ☐ Determine knowledge, skills or abilities to be gained and develop clear training objectives.
  - S – Simple
  - M – Measurable
  - A – Achievable
  - R – Realistic
  - T – Task Oriented
- ☐ Determine the target audience and their needs; consider their knowledge and skills, special interests, biases, and reasons for attending.
- ☐ Determine number of participants and how they will be invited.
- ☐ Determine method of presentation (online / web-based, CD / DVD, webinar, blended learning).
- ☐ Determine amount of time needed and agenda / lesson plan.
- ☐ Determine Continuing Education Units (CEU) source, requirements, and procedure, if provided.
- ☐ Determine registration fee and method of collection, if applicable.

- ☐ Determine evaluation process.
  - Instrument design (within learning management system (LMS) or outside LMS)
    - Course effectiveness – achievement of objectives, student knowledge & skill, job applicability, accuracy of content
    - Participant satisfaction & recommendation
    - Instructor effectiveness
  - Data analysis
  - Application of results

## DESIGN AND DEVELOPMENT

- ☐ Determine best way to design the event in the electronic Learning Management System (LMS) (i.e., TRAIN-Florida). Communicate with the appropriate system Course Manager.
- ☐ Consider any Americans with Disabilities Act (ADA) accessibility issues for online courses. (see Additional Resources, p.61)
- ☐ Develop course content, incorporating various learning strategies, as appropriate.
- ☐ Design the course activities and assignments, as appropriate.
- ☐ Write the script for the audio portion of the course, if applicable.
- ☐ Identify and coordinate with video or audio presenters, if applicable.
- ☐ Rehearse and record the audio track, if applicable.
- ☐ Design the pretest, section tests, and posttest, as needed for the course.
- ☐ Design the evaluation instrument (s), to include the extent each objective was met.
- ☐ Peer Review and Approval: Ensure the finished draft of all course material is reviewed by the Program Manager and an independent third party subject matter expert (someone outside supervisory chain of command and project team).
- ☐ Ensure Program Manager completes the online review form and emails supporting materials to [PHMP\\_TrainEx@doh.state.fl.us](mailto:PHMP_TrainEx@doh.state.fl.us) before the submission deadlines for the review.
- ☐ Design course completion certificate, as appropriate.
- ☐ For projects supported with PHMP funds, complete the Tier Review Process for approval and make modifications as recommended.  
(see Curriculum and Exercise Review at <http://www.floridahealth.gov/preparedness-and-response/training-exercise/exercisereview.html>)
- ☐ When all course components are developed and approved, as needed, create the course in the LMS. Follow the steps for course creation specific to the LMS.

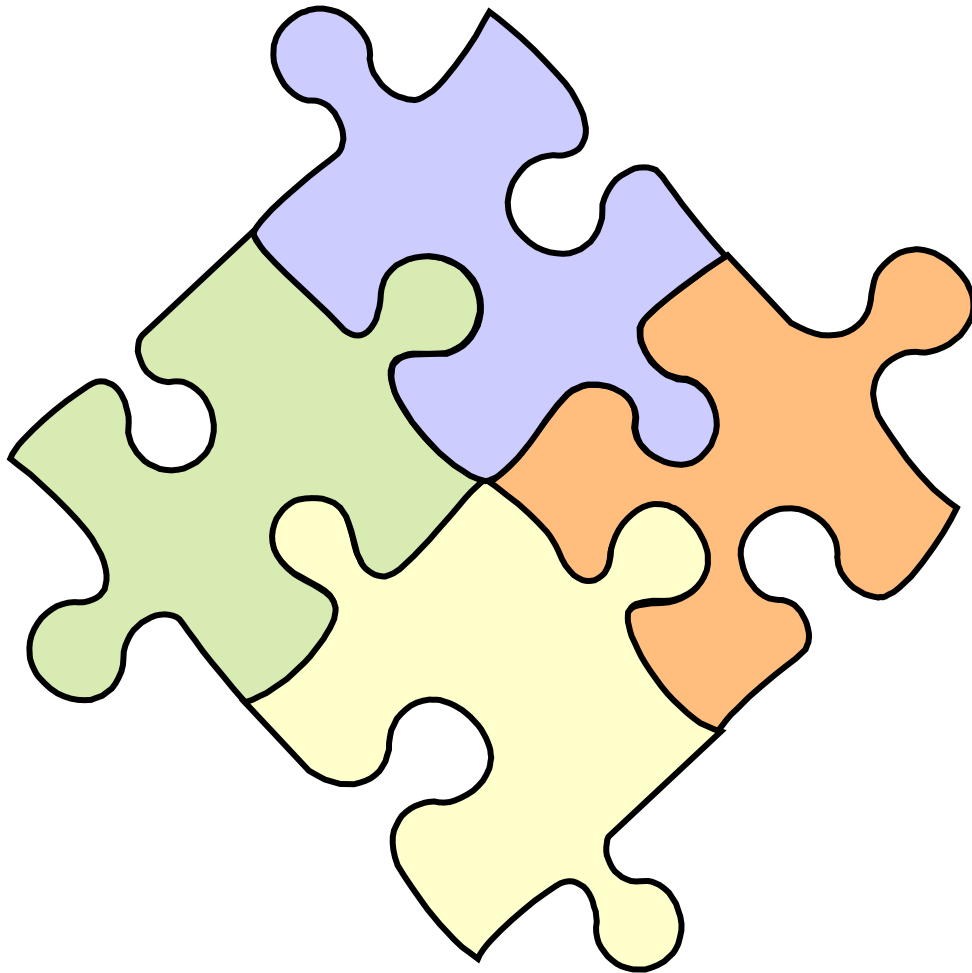
## IMPLEMENTATION AND EVALUATION

- ☐ Create / send course announcement / invitation, to include:
  - Course name
  - Registration / enrollment information
  - Course description
  - Contact person for additional information
  - Who should attend
  - Cost (if any)
  - Continuing Education (CEU) information
- ☐ Once the class is live, regularly monitor participant progress and provide technical assistance to participants.
- ☐ Compile and analyze attendance, testing, and evaluation results, prepare summary report, determine and implement next steps for improvement.
- ☐ Submit summary report to supervisor or others, as appropriate.

**For information on using a blended learning approach (combined classroom and web-based) see also "Training Event Planning Checklist."**

Source: Adapted from *Handbook for Trainers*, Florida Department of Health, September 2003

# **DESIGN, DEVELOPMENT AND DELIVERY**



## **ADDIE Training Model**

Training programs are most effective when they are planned and designed in a systematic way, thereby ensuring that the training was needed and the objectives were met. The ADDIE model is one approach to instructional design that has been proven effective. It typically includes the following steps or phases:

- A – Analysis
- D – Design
- D – Development
- I – Implementation
- E – Evaluation

Following an instructional design methodology to create a training program or event helps ensure that the end product is useful, relevant, purposeful, and effective. Education and training events that are Public Health and Healthcare Systems Preparedness (PHHP) funded and reviewed through the Tier Review Process, are encouraged to be developed using an instructional design method, such as ADDIE.

More information on instructional systems design (ISD) and the ADDIE model can be found on the internet. Search for ADDIE, instructional design, instructional systems design, or ISD model.

The Florida Department of Health, the Office of Workforce Development, has adopted the ADDIE method of instructional design, and added an “R” at the end of the process. This is the Revision part of instructional design to promote the continuous improvement based on the evaluation of the course. (See Attachment 1 of the [Training Development and Review Standards](http://www.floridahealth.gov/preparedness-and-response/training-exercise/documents/training-devel-rev-standards.pdf) at <http://www.floridahealth.gov/preparedness-and-response/training-exercise/documents/training-devel-rev-standards.pdf> )

## **Training Needs Assessment**

A needs assessment is a systematic process for identifying needs or gaps in the participating audience’s current knowledge, skills, or abilities. It can also be done to identify and plan for the future needs of the audience.

Results of the needs assessment are tabulated, grouped, and prioritized.

- Needs assessment instruments designed with questions or categories that evoke responses that can be counted (i.e., a rating scale, multiple choice, or yes / no), along with free response opportunities, are more effective.

- Responses for each question and category are counted. Based on the resulting tabulations, responses can be grouped to identify trends or areas of need / gaps.
- Gaps can then be prioritized using factors such as greatest need, affordability, and expeditiousness. Free responses, or those that identify future needs or desires, should also be grouped and prioritized, as appropriate.

Prioritized gaps become the foci of action taken by the organization. If training or performance gaps are identified, training or experiential learning opportunities that address the gap would be identified or developed, and provided to the target audience. A follow-up evaluation of the participants' resulting knowledge, skills and abilities would be appropriate and effective.

It is a good idea to conduct a needs assessment on a regular basis, such as once every one to three years or more frequently, if desired. It can also be done for a specific audience or subject, to determine the needs of participants.

More information on training needs assessment can be found on the internet. Search for training needs assessment or needs assessment.

## Writing Learning Objectives

Objectives describe the behavior a learner will be able to demonstrate after completing a training. A behavior is based on knowledge, skills or abilities relevant to the training. Objectives state WHO will do WHAT and HOW WELL (measure).

### Objectives –

1. Are stated clearly and address only one skill.
2. Identify **who** will demonstrate the action (i.e., participants will...).
3. Define or describe an **action**, by including a verb.
4. Are **measurable**, through the use of quantifiable terms.

### Examples:

- Participants will list 4 of the 6 levels of learning described in the course.
- Participants will select the correct level of PPE for 3 hazard scenarios.
- Participants will design a presentation that includes 3 types of animation.

The Homeland Security Emergency Exercise Program (HSEEP) uses the acronym S.M.A.R.T. to explain how objectives are to be written. This acronym is used by other organizations, as well, with some variation in wording.



**S** – Specific: objectives specify what needs to be done with a timeline for completion

**M** – Measurable: should focus on observable actions and outcomes

**A** – Achievable: within the control, influence, and resources of exercise play and participant actions

**R** – Realistic:  
Instrumental to the mission of the organization and link to its goals or strategic intent

**T** – Task Oriented: specific and reasonable timeframe should be incorporated into objectives

(HSEEP Participant Manual, 2013, Table 3.1)

### Sample Action Verbs:

analyze	critique	explain	rate
apply	define	identify	recall
appraise	demonstrate	justify	recite
categorize	describe	list	recommend
compare	design	modify	separate
compose	develop	name	solve
compute	differentiate	operate	state
construct	discuss	organize	translate
contrast	distinguish	paraphrase	use
create	evaluate	plan	write

## Learning Styles and Teaching Techniques

It has been said that “variety is the spice of life.” This is also true in the art of teaching adults in this ever-changing world. Methods used 20 years ago may not apply today. Available technology and understanding of the learning process have advanced considerably. For teaching to be effective today, current beliefs and techniques need to be used in combination with time-tested teaching techniques and theory. Keep in mind that “one size does not fit all;” we now understand that people have different learning styles or preferences. For training to be effective, it must include techniques that reach the varied learning styles of the audience. The next few pages will give a brief overview of adult learning concepts, learning styles / preferences, and basic teaching techniques.

People learn best when:

- Training is relevant, related to their job or applicable to them.
- The learning environment allows for an exchange of ideas.
- Training builds on previous concepts, knowledge or experiences.
- They are actively involved.

## Learning Styles and Preferences

Individuals learn and process information differently. The subject of brain function, information processing, and learning have been studied for decades and numerous theories have been developed that support this belief. A few are briefly summarized below.

- ❖ Commonly identified Learning Styles include:
  - Visual – learning best through seeing, reading, pictures, diagrams, etc.
  - Auditory – learning best through hearing, listening, lecture, music, etc.
  - Kinesthetic – learning best through moving, touching, simulation, physical activity, etc.
- ❖ Howard Gardner identified seven types of learning preferences, referred to as the Seven Multiple Intelligences; linguistic, logical-mathematical, musical, bodily-kinesthetic, spatial, interpersonal, and intrapersonal. A brief description follows:

*“Linguistic intelligence* involves sensitivity to spoken and written language, the ability to learn languages, and the capacity to use language to accomplish certain goals.”

*“Logical-mathematical intelligence* involves the capacity to analyze problems logically, carry out mathematical operations, and investigate issues scientifically.”

*“Musical intelligence* entails skill in the performance, composition, and appreciation of musical patterns.”

*“Bodily-kinesthetic intelligence* entails the potential of using one’s whole body or parts of the body (like the hand or the mouth) to solve problems or fashion products.”

*“Spatial intelligence* features the potential to recognize and manipulate the patterns of wide space ... as well as the patterns of more confined areas....”

*“Interpersonal intelligence* denotes a person’s capacity to understand the intentions, motivations, and desires of other people and, consequently, to work more effectively with others.”

*“Intrapersonal intelligence* involves the capacity to understand oneself, to have an effective working model of oneself – including one’s own desires, fears, and capacities – and to use such information effectively in regulating one’s own life.”

(Gardner, *Intelligence Reframed: Multiple Intelligences for the 21<sup>st</sup> Century*, 41-43)

- ❖ David Kolb focused his work on experiential learning and identified four learning styles that worked in combination with the learning process.

The four phases of the learning process are:

“Experiencing – learning from specific experiences, being sensitive to feelings and people.”

“Observing – observing before making judgments, viewing issues from different perspectives, looking for the meaning of things.”

“Thinking – locally analyzing ideas, planning systematically, acting on an intellectual basis.”

“Action – learning through ‘hands on’ activities, dealing with people and events through action.”

The four learning styles are:

- “The creator (diverging style)”
- “The planner (assimilating style)”
- “The decision maker (converging style)”
- “The do-er (accommodating style)”

( (<http://www.learningfromexperience.com/about-us/>) )

- ❖ Richard Felder and Linda Silverman developed an *Index of Learning Styles*, which included categories on a continuum, as follows: Sensory to Intuitive, Visual to Verbal, Active to Reflective, Sequential to Global. The groupings are based on a person’s preferences for processing and understanding information.

(Felder, R.M., Silverman, L. K., 1988/2002)

(<http://www4.ncsu.edu/unity/lockers/users/f/felder/public/Papers/LS-1988.pdf> )

- ❖ Personality inventories can also be helpful and applicable to the learning environment. The “True Colors” personality inventory uses the groupings of gold, blue, green, and orange. The Myers-Briggs personality inventory identifies sixteen personality types based on a person’s preferences in four areas.

With so many possibilities, what’s a trainer to do? It is not practical or necessary to determine the learning style or preference for each participant each time you teach a class. What is important is that you include a variety of teaching methods, learning experiences and activities that accommodate a variety of learning styles. In this way, you can add interest to the class and increase participant learning.

It may be helpful to identify your own learning style or preference by reading more on the subject or completing the various assessment tools that help you discover your learning style. It is common for trainers to use teaching methods that accommodate their personal learning style, which is fine if all the participants have the same learning style as the trainer. Chances are this is not the case and it is important for the trainer to consciously incorporate and become comfortable using a variety of teaching methods. This will increase participation and learning retention, and minimize frustration and boredom on the part of the participants.

## Teaching Methods

A trainer should not rely on a single method of instruction for all topics within a training session. If the same method of instruction is used throughout the program, it can create barriers to learning (boredom, fatigue, etc.).

The skilled trainer will look at a topic and decide on a number of methods that can be used independently or in combination, for maximum benefit to the learner. The more interactive the teaching method, the more the participants will learn and retain.

| Typical teaching methods include:

Teaching Method	A Few Tips
Lecturing by one or more instructors	<ul style="list-style-type: none"><li>• Balance lecture time with activities, audience questions and interaction, and breaks.</li><li>• Vary tone and inflection of voice appropriate to the content.</li><li>• Be familiar with lecture material and focus on the audience rather than lecture notes.</li><li>• Coordinate timing when using multiple lecturers and agree on rules about interjecting thoughts during each other's lecture times.</li></ul>
Participant Reading	<ul style="list-style-type: none"><li>• Ensure copies have good print quality and are visually appealing.</li><li>• Provide a folder for loose handouts.</li><li>• Make enough copies for all participants, plus a few for unexpected participants.</li><li>• Provide a microphone when reading is auditory.</li></ul>
Presentation slides, posters, video or audio clips	<ul style="list-style-type: none"><li>• Consider visual and audio materials from the audience perspective.</li><li>• Make print large enough to read from anywhere in the room.</li><li>• Use color and pictures that enhance visual quality.</li><li>• Ensure audio is set at correct volume and is clear.</li></ul>
Instructor demonstrating a certain action or showing samples of a product	<ul style="list-style-type: none"><li>• Perform demonstrations where all participants can observe.</li><li>• Set up a display table for participant viewing during breaks or pass around sample products, as appropriate.</li><li>• Provide an information sheet with process steps.</li><li>• Secure participant volunteers, if needed, prior to beginning class.</li></ul>
Large and small group activities or discussions	<ul style="list-style-type: none"><li>• Arrange the room conducive to group activity.</li><li>• Use creative methods to divide participants into groups (sorting cards, candy, stickers, colors, numbering, etc.).</li><li>• Move around the room to observe and interact with small groups.</li><li>• Provide groups with the supplies needed to perform the task.</li><li>• Have groups identify roles needed for the task (recorder, reporter, etc.) and encourage shifting roles, as appropriate.</li><li>• Be sure to process the activity with the class after small groups have completed it. This can be done through group reports and instructor summary.</li></ul>

	<ul style="list-style-type: none"> <li>• Be aware of time constraints.</li> </ul>
Participants demonstrating or practicing a procedure or action	<ul style="list-style-type: none"> <li>• Arrange the room to allow space for the activity.</li> <li>• Provide participants with the supplies needed to perform the task.</li> <li>• Encourage participants to be supportive of one another.</li> <li>• Provide constructive feedback to the participants after the demonstration / practice.</li> <li>• Be alert to accuracy and safety issues in the participant demonstrations / practice and address issues with the participant and / or class.</li> </ul>
Participants helping each other learn a concept, procedure or action and then using it on the job	<ul style="list-style-type: none"> <li>• Arrange the room to allow space for the activity, if performed in the classroom.</li> <li>• Ensure participants have the supplies needed to perform the task.</li> <li>• This activity involves more independence on the part of the participant, but observation by the instructor or another qualified observer is still necessary.</li> <li>• Be alert to accuracy and safety issues and address them with the participants.</li> <li>• Follow up with participants to ensure successful use of learning on the job, as appropriate.</li> </ul>

Source: Teaching Methods adapted from the Learning Pyramid, National Training Laboratories, Bethel, Maine.

## Group Learning Activities

Interactive small groups give participants an opportunity to discuss ideas and ask questions in greater detail than is possible in a large group format. Participants often feel more comfortable expressing themselves in small groups than they might with the entire class. Group activities also provide an opportunity to clarify the material and provide feedback to participants.

### Suggestions for Working with Groups:

- Case scenarios or role plays are ideal for the small group, as are group questions, research activities, and teaching presentations.
- Determine the amount of time needed for the activity and ensure it is clearly structured and well-paced.
- Groups work best with a small number of members.
- Give each group written instructions for the activity, including expectations of the group (a summary report, demonstration, etc.).
- Encourage groups to assign roles to the members, as appropriate (facilitator, recorder, reporter, timekeeper, etc.).

- It is very important for the instructor to move about the room to observe, answer questions, and facilitate or expedite the process.

## Questioning Techniques

The effective use of questions throughout a class increases participants' understanding of the material, as well as their levels of interaction and interest in the class. There is an art to asking questions that involves the type of question, the timing, and the response.

There are several types of questions:

Open-ended and Closed-ended questions	<ul style="list-style-type: none"> <li>▪ Open-ended questions allow the participant to give more information than just a one word answer. (<i>What does it mean to be prepared?</i>)</li> <li>▪ Closed-ended questions result in a yes or no answer, or other one word response. (<i>Is it good to be prepared? – or – Do you work in planning, operations, logistics, or finance?</i>)</li> </ul>
Follow up questions	<ul style="list-style-type: none"> <li>▪ Follow-up questions are asked in response to a previous question or comment by a participant or the instructor.</li> <li>▪ They are related to the current discussion, though they may draw the participants' thoughts in a new direction.</li> </ul>
Clarifying questions	<ul style="list-style-type: none"> <li>▪ Clarifying questions are a type of follow up-question used to gather more detail or a better understanding of a participant's response.</li> <li>▪ They are important to use during class discussion, when participants' responses are confusing or inaccurate, and provide the class with clear and accurate information.</li> </ul>
Direct questions	<ul style="list-style-type: none"> <li>▪ Direct questions are asked of a specific person.</li> <li>▪ Care should be taken that participants are not embarrassed or singled out in a negative way.</li> <li>▪ If a person is not able to answer within a short time, ask the question of others in class or re-phrase the question.</li> <li>▪ When using direct questions, ensure a variety of questions are asked of numerous participants, not the same one or two participants every time.</li> </ul>
Group questions	<ul style="list-style-type: none"> <li>▪ Group questions are directed to the entire class.</li> <li>▪ Encourage more than one participant to offer a response, as appropriate, or follow up by asking if others agree or have additional thoughts on the subject.</li> </ul>

## Question Timing:

- Allow participants enough time to think of their response and verbally answer questions; learn to be comfortable with silence. When the instructor jumps in with the answer, or moves on to another person for an answer too quickly, participants may decide not to attempt to answer later questions.
- Silence also has an interesting effect on the class; participants will feel the need to answer the question out of their desire to fill the silence with words.

- Sometimes, participant silence indicates a lack of understanding of the question or the subject. The instructor can provide a little more information or reword the question.
- Be alert to the flow of the discussion and ask questions that are relevant and timely.

#### Responses:

- Be alert also to the accuracy and clarity of participant responses.
- It is a good idea to repeat the audience response to ensure you heard it correctly and so all the participants are able to hear the response.
- Always provide some form of acknowledgement to the responder. Answering questions or offering suggestions in class involves taking a risk, and participants are more likely to continue their active participation when they receive acknowledgment and encouragement.
- Take care not to cause the participant embarrassment by pointing out the errors of the response in a negative way. Try to reframe the response to highlight the good points and provide clarification of the inaccurate information. It is important to leave the class with accurate information.

Source: Portions adapted from *Handbook for Trainers*, Florida Department of Health, September 2003

# Lesson Planning

A well-prepared lesson plan helps the instructor organize the material, plan the most effective delivery method and keep the class on target. The following model can increase teaching effectiveness:

- **Give an overview** of the session, including the learning objectives and expectations.
- **Present material** in an effective, efficient and relevant manner by employing instructional strategies that actively involve participants in the learning process.
- **Review** material and how the objectives were achieved, and close on a positive note.

**Lesson Plans should include:** (see sample lesson plan)

## **Objectives and Expectations**

List and explain class objectives and expectations.

## **Opening**

List the opening actions, statements, or brief activity that will gain the interest of participants and help them see how the class applies to them.

## **Lesson Content**

Outline modules, topics and key points, and identify instructional methods.

## **Supervised Practice**

Include activities that allow participants to use new information and practice skills they've learned, with observation and feedback from the instructor.

## **Evaluation of Understanding**

Identify how and when participant learning will be evaluated.

## **Summary**

Identify how material will be reviewed with the participants, ideally after each module and at the end of the course.

## **Follow-up Practice**

Include a thought-provoking assignment or issue that encourages and helps participants apply learning on the job.

## **Time Allotted**

Estimate amount of time needed to complete sections / activities. Allow for breaks.

## **Presentation – Instructor Tasks**

Identify steps in the presentation of the course.

## **Learner Involvement**

Identify how participants will have an interactive part in the lesson and their learning.

## **Training Aids and Materials**

Identify handouts, manuals, supplies, visual aids, equipment, etc. to be used for each section / activity.



## Sample Lesson Plan Format

Class Name:		Instructor Name:	
Date:		Location:	

Phase	Time Allotted	Presentation – Instructor Tasks	Learner Involvement	Training Aids and Materials
Objectives and Expectations				
Opening				
Lesson Content				
Supervised Practice				
Evaluation of Understanding				
Summary				
Follow-up Practice				

## Training Aids Overview

Many people comprehend concepts more clearly if they are presented visually rather than through a lecture only.

Training aids:

- Should arouse interest and hold the participant's attention.
- Assist in communicating knowledge and ideas to the participant.
- Accelerate learning with the involvement of multiple senses.
- Can improve learning if used with imagination and if they contain relevant information.
- Aid in retention of information learned.
- Ensure more consistency in repeat presentations.

Good visual aids are simple and easy to understand, brief and concise, and stress essential points. They are clearly visible, using a print font, color, spacing and design that increase legibility and interest.

### Participant Materials

- To remember new information, learners must relate it to what they know. Examples and illustrations help, as do real-life scenarios.
- Handouts must provide detailed information that learners can use in the work setting. It is also important for materials to be visually attractive.
- Pre-training event materials may include a confirmation letter, draft agenda, travel information and map, and for some classes, prerequisite reading material and / or pretest.
- On-site materials may include a final agenda, participant manual or copy of the presentation(s), brief speaker bios, participant list and participant's nametag.
- Additional training event materials can be given out at the registration table or in the classroom.
- Reference materials or resource materials may include pamphlets or catalogs from organizations related to the audience's field and the topic.

### Microphones

- The presenter must be able to project his / her voice throughout the room. Always reserve a microphone.
- Microphones are available in many varieties - podium, lavalier and wireless. If the presentation includes audience participation, a wireless microphone may be most desirable.

### Videos

- Video segments should be integrated into the overall presentation and be brief.
- Participants should be told what the video will address and to what they should pay particular attention.

Source: Adapted from *Handbook for Trainers*, Florida Department of Health, September 2003

## Flip Charts

Flip charts are widely used – and misused – in the training process. They can be used effectively to create real-time visuals (that is, they can be drawn as the presentation takes place), or they can be developed in advance. The following are suggestions for effective use of flip charts.

- ❖ Use flip charts for spontaneous recording and for training content you wish to retain.
- ❖ Avoid putting lengthy material on the flip chart.
- ❖ Place the flip chart close to participants for visibility. For this reason, flip charts are less effective for large audiences.
- ❖ Use broad-tipped markers rather than fine-tipped markers.
- ❖ Print using a letter size that is easily read.
- ❖ Title each page.
- ❖ Leave a blank sheet of flip chart paper between each page of writing to prevent marker bleed-through and distracting visibility of the following page.
- ❖ Dark colors are the most visible colors to use. Avoid red, except for highlighting, underlining, etc.
- ❖ Be creative with bullets and borders, but ensure they do not distract from the content.
- ❖ Keep spacing equal between words and lines; avoid squeezing as the available space decreases.
- ❖ Sketch content in pencil prior to using markers to avoid errors.
- ❖ Grip the flip chart with one hand to stabilize it as you write.
- ❖ Stand to the side of the flip chart and face participants while speaking.
- ❖ Use adding machine or other types of paper as a cover for content needing to be revealed individually.
- ❖ Be aware of any repetitive movements with the markers, as they can be distracting to participants.

Source: Adapted from *Essential Trainer Skills – Participant Guide*, Florida Department of Children and Families, May 2002.

# PowerPoint Presentations

PowerPoint presentations are very popular and can be a useful training tool. However they should support the presentation or training and not detract from it. The tips listed below can increase the effectiveness of the presentation and participant learning.

## Formatting

- Use 1-inch margins for all sides.
- Use medium-heavy fonts, bold and shadowed.
- Number the slides.
- Use consistent formatting patterns for a cohesive presentation.

## Content

- Make the slides self-explanatory, but succinct.
- Make the slides easy to understand.
- Avoid jargon and acronyms.

## Backgrounds

- Use a solid color with contrasting text; light background with dark text works well.
- Should not overpower or distract from content.

## Text

- Information should be bulleted rather than paragraph style.
- Use only 4 - 6 bullets of text per slide and use only 2 lines per bullet.
- Keep designs and documents simple.

## Font

- Use Arial, Tahoma, or Veranda fonts for clarity and legibility.
- Use no more than 3 different font styles.
- Title text should be 36 pt or larger; body text should be 24 pt or larger.

## Color

- Use dark text on light backgrounds and light text on dark backgrounds.
- Use color themes that work well together.
- Avoid RED, except for accent, because it is difficult for the audience to read.

## Graphics

- Use pictures and graphics to emphasize or demonstrate concepts.
- Pictures and graphics may extend to the edges.
- Information needs to be provided in a simple and clear manner in order to be visible.
- Detailed graphs and charts cannot be seen by the audience and should be given as a handout.

## Animation

- Animation should add interest and emphasis.
- Too much animation can be distracting.
- Use animation timing carefully.

Source: Adapted from *Handbook for Trainers*, Florida Department of Health, September 2003

# **LCD and Overhead Projectors**

## **LCD Projectors**

- ❖ Follow projector instructions for activation sequence.
- ❖ Practice with your computer and LCD projector ahead of time to ensure functionality.
- ❖ Carry a spare bulb, extension cord, and the number of your IT technician.
- ❖ The projector can be used in a fully lit room.
- ❖ If a screen is not available, you can project onto a plain light-colored wall. Projecting on a white board can sometimes cause a glare.
- ❖ Set the projector where it will not block participants' views of the screen.
- ❖ Set the projector squarely in front of the screen to avoid distortion.
- ❖ Adjust the distance between the projector and the screen to change the size of the image.
- ❖ Focus the image and check for readability from the farthest point in the room.
- ❖ Stand where you will not block the participants' views of the screen.
- ❖ Face the audience when speaking.
- ❖ Videotapes and DVDs can be projected through the LCD projector for a larger image. Follow equipment instructions for proper connection.

## **Overhead Projectors & Transparencies**

- ❖ Have transparencies numbered and in proper order. Ensure you have enough space for two stacks of transparencies, one for before display and one for after display.
- ❖ Transparencies can be produced on a computer, copy machine, or by hand (use a transparency marker).
- ❖ Point to the image on the projector, not the screen.
- ❖ Be aware of participant visibility, as described above.

Source: Adapted from *Essential Trainer Skills – Participant Guide*, Florida Department of Children and Families, May 2002.

## Training Room Checklist

- ❖ Create your own checklist of all materials, supplies and equipment needed.
- ❖ When setting up the room, remove unnecessary materials, supplies, furniture and equipment.
- ❖ Check out ventilation, temperature, lighting, any noises and outside disturbances.
- ❖ Try all light switches, power outlets, fan switches, etc.
- ❖ Clean all dry erase boards and remove any flip chart pages and paraphernalia from previous classes.
- ❖ Put all equipment and materials where they will be needed and in proper sequence.
- ❖ Check that all equipment (e.g., projector, computer) is functioning.
- ❖ Focus and adjust all equipment.
- ❖ Check the visibility of your aids from all seats and angles.
- ❖ Check all trainee supplies, such as manuals, notepaper, pens, and name cards.
- ❖ Check locations of washrooms, coffee, fire exits, telephones, and message center.
- ❖ When setting up seating, consider comfort and participation. Eye contact between participants and instructor is important for good participation.
- ❖ Minimum room size should be 30 square feet per person. Do not overcrowd, but if people are spread too far apart, there will be less participation.
- ❖ If learners will do much writing, provide 9 square feet per person of table space.

Source: Adapted from *Essential Trainer Skills – Participant Guide*, Florida Department of Children and Families, May 2002.

# Training Room Set-Up

## Locating Training Rooms

Training space is often available, at no cost, through a local county health department, school district, Area Health Education Center (AHEC), state university or community college. Training space can also be found at local conference hotels, restaurants, and community auditoriums, but may require payment.

## Room Set-Up: Creating a Positive Learning Environment

“The room design must match the learning objectives for the session. The degree of participant involvement expected, the relationship between presenters and participants, and the character and dynamics of the group are all factors to be considered in room set-up design. The following chart lists possible meeting room set-ups and the positive and negative impact each arrangement can have on the learning environment” (Polivka, 1996).

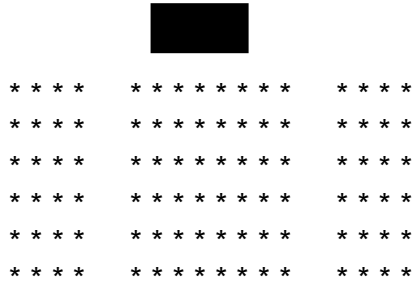
Room Set-Up	Positives	Negatives
Rounds and Half-rounds	<ul style="list-style-type: none"> <li>• Ample work space</li> <li>• Good local interaction</li> </ul>	<ul style="list-style-type: none"> <li>• Poor full-room interaction</li> <li>• Sound bleed from close-by tables</li> </ul>
Squares and Rectangles	<ul style="list-style-type: none"> <li>• Variety of arrangements possible</li> <li>• Good work space</li> <li>• Good working atmosphere</li> </ul>	<ul style="list-style-type: none"> <li>• 16” size not big enough for adequate work space</li> <li>• Extensive skirting may be needed</li> </ul>
Classroom	<ul style="list-style-type: none"> <li>• Presenter can see all participants</li> <li>• Accommodates large groups in less space</li> </ul>	<ul style="list-style-type: none"> <li>• Minimal interaction possible</li> <li>• Participants only see each other’s backs</li> </ul>
V-shapes	<ul style="list-style-type: none"> <li>• Same as classroom, but with more interaction</li> </ul>	<ul style="list-style-type: none"> <li>• Usually will not work with large groups</li> <li>• Participants may be far from the presenter</li> <li>• Sight lines may not be ideal for all participants</li> </ul>
T-shapes	<ul style="list-style-type: none"> <li>• Good for small groups</li> <li>• Good interaction</li> </ul>	<ul style="list-style-type: none"> <li>• Often used for too large a group</li> <li>• Larger sizes mean poor sight lines and back views</li> </ul>
Theater Style	<ul style="list-style-type: none"> <li>• Good for large groups when reading / writing are not required</li> </ul>	<ul style="list-style-type: none"> <li>• Elevation changes needed for large groups</li> <li>• No writing surface</li> <li>• Minimal group interaction</li> </ul>
Chairs in a Circle	<ul style="list-style-type: none"> <li>• Best for creating informal and participatory groups</li> <li>• Presents speaker as a group member / facilitator</li> <li>• Good for groups up to 30 people</li> </ul>	<ul style="list-style-type: none"> <li>• Not good for note taking</li> <li>• Not good for presenters with notes or audiovisual aides</li> </ul>

(Polivka, 1996)

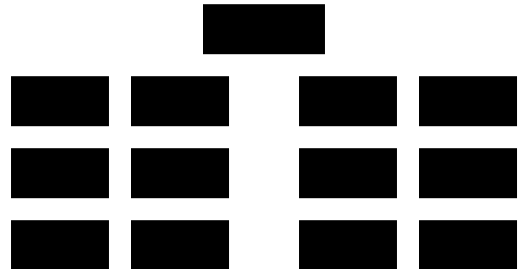
Source: Adapted from *Handbook for Trainers*, Florida Department of Health, September 2003

# Seating Diagrams

**Theater Seating**



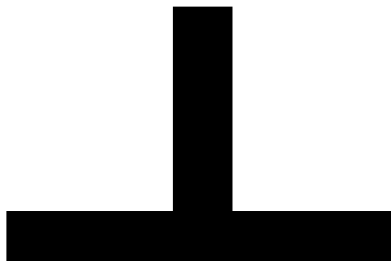
**Classroom Seating**



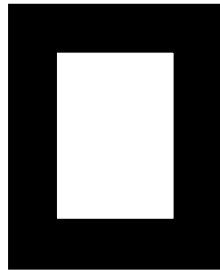
**Conference Style**



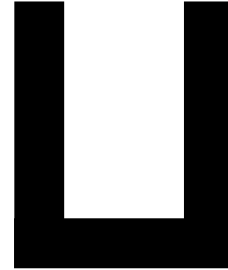
**T – Formation**



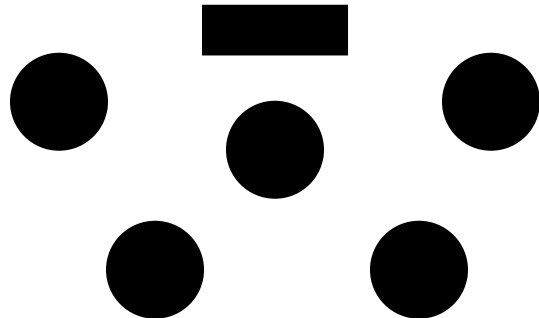
**Hollow Square**



**“U” or Horseshoe**



**Banquet Seating**



**V – Formation**



Source: Adapted from *Handbook for Trainers*, Florida Department of Health, September 2003



## Delivery Skills for Effective Presentations

Nonverbal Skills	<ul style="list-style-type: none"> <li>• Smile often. Be friendly and positive.</li> <li>• Be yourself when speaking.</li> <li>• Stand when you wish to command attention.</li> <li>• Sit when you want to leave the limelight.</li> </ul>
Eye Contact	<ul style="list-style-type: none"> <li>• Acknowledge responses with nodding, eye contact, and facial expressions.</li> <li>• Look at the participants more than your notes.</li> <li>• Look at everyone, not just a few supportive faces.</li> <li>• Engage in enthusiastic conversation rather than lecturing.</li> </ul>
Poise and Self-Confidence	<ul style="list-style-type: none"> <li>• Hands should look comfortable; never clench into fists or clutch your sides.</li> <li>• Leave your hands to your sides except for meaningful gestures.</li> <li>• Maintain a relaxed posture.</li> <li>• Be dignified, not stiff.</li> </ul>
Movement and Gestures	<ul style="list-style-type: none"> <li>• Do not stand in one place, but avoid pacing.</li> <li>• Try not to use a podium; move toward the participants.</li> <li>• Make movements meaningful, not distracting.</li> <li>• Time movements with statements.</li> <li>• Avoid distracting behaviors, like jingling change, pen clicking, waving a pointer, constant throat-clearing, repetitive movements, pet phrases, etc.</li> </ul>
Voice	<ul style="list-style-type: none"> <li>• Strive for variety in your voice.</li> <li>• Tone should be normal, not monotonous.</li> <li>• Use inflection for emphasis, to portray enthusiasm and provide variety.</li> </ul>
Volume	<ul style="list-style-type: none"> <li>• Change volume as appropriate for emphasis and situation.</li> <li>• Speak loudly enough to reach the entire class.</li> <li>• Project your voice.</li> <li>• Pause and be silent to command attention, when appropriate.</li> </ul>
Speed	<ul style="list-style-type: none"> <li>• Don't speak too quickly or too slowly.</li> <li>• Change speed and tempo of speech.</li> <li>• Slow down for emphasis; increase speed to generate enthusiasm.</li> </ul>
Word Usage	<ul style="list-style-type: none"> <li>• Avoid filler words like "ok," "um," "you know."</li> <li>• Pronounce and enunciate words clearly.</li> <li>• Use pauses to emphasize words.</li> </ul>
Timing	<ul style="list-style-type: none"> <li>• Attention span in most learners is 20 minutes or less.</li> <li>• Insert brief activities or audience response opportunities.</li> <li>• If necessary, call a break or ask people to stand and stretch.</li> <li>• Avoid non-interactive sessions during 11:30–12:00, 1:00–1:30, 4:30–5:00.</li> </ul>
Variety	<ul style="list-style-type: none"> <li>• Be humorous if it is your style. If not, don't try to be.</li> <li>• Start with an interesting statement, observation, quotation, or question.</li> <li>• Use cartoons, pictures, slides, and flipcharts to enliven a presentation.</li> <li>• Use examples, anecdotes, analogies, and statistics.</li> <li>• Ask frequent questions.</li> <li>• Include small group activities, neighbor discussions, and brief assignments.</li> <li>• Provide a presentation outline or agenda.</li> <li>• Give participants a structured handout for taking notes. (i.e., PowerPoint handouts with 3 slides / notes per page).</li> <li>• Build in reviews.</li> <li>• Give a brief quiz to review the content.</li> </ul>

Source: Adapted from *Essential Trainer Skills – Participant Guide*, Florida Department of Children and Families, May 2002.

## Common Challenges for New Instructors

Common Challenge	New Instructors...	Possible Solutions
Fear	Lack confidence and feel anxious when delivering training	<ul style="list-style-type: none"> <li>• Practice material.</li> <li>• Practice in front of a friend or family.</li> <li>• Deep breathing / relaxation techniques.</li> </ul>
Personal Experiences	Do not have stories about personal experiences to incorporate into the training in order to relate to a specific organization or subject matter.	<ul style="list-style-type: none"> <li>• Open it up to the participants; ask them to share their experiences.</li> <li>• Talk to other trainers and use their experiences.</li> </ul>
Difficult Learner Behaviors	Have trouble knowing how to handle a participant who presents a behavior problem by being angry, passive, or dominant.	<ul style="list-style-type: none"> <li>• Speak with participant individually before / after class or during breaks. Take a break if a situation is escalating.</li> <li>• Keep your voice calm when dealing with an angry participant; keep in mind he / she is probably angry about something other than you. Speak with him / her individually; consider attendance alternatives.</li> <li>• Use interactive instruction methods to include all participants.</li> <li>• Use dominating participants as assistants, as appropriate, i.e., recording audience responses on a flip chart.</li> <li>• Focus attention on attentive participants; avert eye contact with inattentive / disruptive participants, when possible.</li> <li>• Give positive reinforcement for appropriate participant behavior.</li> </ul>
Participation	Have difficulty getting people to participate.	<ul style="list-style-type: none"> <li>• Know the audience and what they do.</li> <li>• Reward participation.</li> <li>• Establish an environment that is conducive to participation.</li> <li>• Take risk first.</li> <li>• Set the tone by greeting participants.</li> </ul>
Timing	Are unsure about timing or pacing and how to avoid rushing through material. They worry about having too much or too little material to present in the allotted time.	<ul style="list-style-type: none"> <li>• Practice and check timing.</li> <li>• Team teach.</li> <li>• Use a timer, as appropriate, during class.</li> <li>• Have a signal person.</li> </ul>
Credibility	Perceive they lack credibility as subject-matter experts with participants.	<ul style="list-style-type: none"> <li>• Study / research material.</li> <li>• Study until trainer feels comfortable with the material.</li> </ul>

<b>Common Challenge</b>	<b>New Instructors...</b>	<b>Possible Solutions</b>
Adjusting Instruction	Find it difficult to adjust a standardized training module to the needs of the participants, or to redesign the presentation during delivery.	<ul style="list-style-type: none"> <li>• Completely address the main points and cover objectives.</li> <li>• Be careful not to change the meaning of standardized material when including additional information.</li> <li>• Be aware of class time when adding activities.</li> <li>• If participants need further clarification of material, have a blank flip chart ready for impromptu information.</li> <li>• A review game can be included to aid participant understanding and can take little or no preparation time. Have basic supplies for this on hand.</li> <li>• Take short breaks or inject short stimulation activities to meet participant needs and increase attention.</li> </ul>
Questions	Using questioning techniques effectively, as well as responding to difficult or unanswerable questions.	<ul style="list-style-type: none"> <li>• Prepare content-related questions to ask the class.</li> <li>• Be prepared with the answers.</li> <li>• Listen to participant comments, then ask related thought-provoking questions.</li> <li>• Listen to participants' questions before giving the answer.</li> <li>• Use the "parking lot" to post questions needing research or to come back to.</li> </ul>
Media, Materials, Facilities	Concerned about how to use media and materials effectively, as well as how to take care of the breakdowns that occur in these areas.	<ul style="list-style-type: none"> <li>• Practice ahead of time.</li> <li>• Bring a spare flip chart, projector bulb, extension cord, markers, scissors, tape, etc.</li> <li>• Bring the number for your local computer technician.</li> </ul>
Opening / Closing Techniques	Need techniques to use for icebreakers, introductions, and effective summaries and closings.	<ul style="list-style-type: none"> <li>• Use resource books with icebreakers and activities.</li> <li>• Ask other trainers for their ideas.</li> <li>• Summarize by reviewing objectives.</li> <li>• Ask class to share what they have learned, relate to the objectives and fill in the gaps.</li> </ul>
Dependency on Notes	Feel too dependent on notes and have trouble determining ways to present information without them.	<ul style="list-style-type: none"> <li>• Practice.</li> <li>• Use flip cards.</li> <li>• Use yellow sticky pads for reference.</li> <li>• Post main points on wall / flipchart.</li> <li>• Use outline.</li> </ul>

Source: Adapted from *Essential Trainer Skills – Participant Guide*, Florida Department of Children and Families, May 2002.

## **Trainer Self-Evaluation Checklist**

### **Presentation of Objectives**

Trainer presented and explained all the objectives orally and in writing.

### **Presentation of Concepts and Key Points**

Trainer presented and thoroughly explained concepts and key points while involving participants.

### **Instructional Methods**

Trainer frequently varied instructional methods, many of which were interactive.

### **Instructional Aids**

Trainer used a variety of instructional aids effectively to demonstrate content and involve participants.

### **Introduction and Monitoring of Learning Activities**

Trainer gave clear and complete instructions, kept participants on task, and monitored activities.

### **Summary of Learning Activities**

Trainer involved participants in follow up discussion of key points and related content to application on the job.

### **Professional Behavior**

Trainer modeled professional behavior and established the same standards for participants.

### **Risk-Taking Behaviors of Participants**

Trainer encouraged and acknowledged risk-taking behaviors (volunteering, asking the first question, admitting lack of skill or knowledge, etc.).

### **Examples, Anecdotes, Stories, Analogies, and / or Humor**

Trainer provided and elicited relevant examples, anecdotes, stories, analogies, and / or humor.

### **Verbal Communication Skills**

Trainer used verbal communication skills to emphasize important points and demonstrate interest, which stimulated participant involvement.

### **Questioning Techniques**

Trainer frequently asked questions related to the content which resulted in participant responses.

### **Nonverbal Communication Skills**

Trainer used nonverbal communication skills for emphasis, which stimulated participant involvement (facial expressions, gestures, body movement, and position).

**Eye Contact**

Trainer frequently made eye contact with participants.

**Voice**

Trainer spoke loudly and clearly enough to be understood by everyone and varied vocal characteristics for emphasis.

**Responding to Relevant Participant Questions**

Trainer answered all relevant questions.

**Maintaining Focus on Content**

Trainer redirected group back to content from irrelevant discussion / comments.

**Incorrect Participant Responses**

Trainer provided the correct response and provided positive reinforcement for participation.

**Disruptive Participant Behaviors**

Trainer intervened in a calm, non-offensive manner and stopped disruptive behaviors.

**Distracting Trainer Behaviors and Mannerisms**

Trainer did not display distracting behaviors and mannerisms.

**Closure of the Class/Module**

Trainer involved participants in a discussion of key points, concepts, or objectives at the conclusion of the class / module and related the content to application on the job.

# Sample Trainer Observation Tool

Trainer:                      Observer:                      Date:

Training event Title:

Location:

Please check all that apply and provide written comments.

---

- A.      Preparation for session:
- ☐ Lesson plan prepared
  - ☐ Facilities set up
  - ☐ Training Aids prepared
  - ☐ Materials and supplies available

Comments:

- B.      Knowledge of the subject matter:
- ☐ Materials / information presented accurately
  - ☐ Materials / information presented thoroughly

Comments:

- C.      Organization of presentation:
- ☐ Introduction included objectives and overview
  - ☐ Summaries and transitions provided
  - ☐ Body of presentation emphasized important points
  - ☐ Provided concise conclusion and summarized major points

Comments:

- D.      Presentation and communication skills:
- ☐ Voice was clear and audible
  - ☐ Gestures were not distracting
  - ☐ Maintained eye contact
  - ☐ Used understandable language
  - ☐ Pace was appropriate

Comments:

- E.      Teaching skills:
- ☐ Waited 3-5 seconds to allow time for participants to respond to questions
  - ☐ Used a variety of teaching strategies
  - ☐ Classroom problems handled appropriately
  - ☐ Instructions given clearly and concisely

Comments:

F. Assessing learner understanding:

- ☐ Used questions to test for knowledge and skills
- ☐ Encouraged students to answer peer questions, as appropriate
- ☐ Provided opportunities for review and questions
- ☐ Invited students to share their knowledge and experience

Comments:

G. Encouraging application of learning:

- ☐ Pointed out practical application of concepts
- ☐ Facilitated job-related discussion
- ☐ Encouraged the incorporation of training into practice

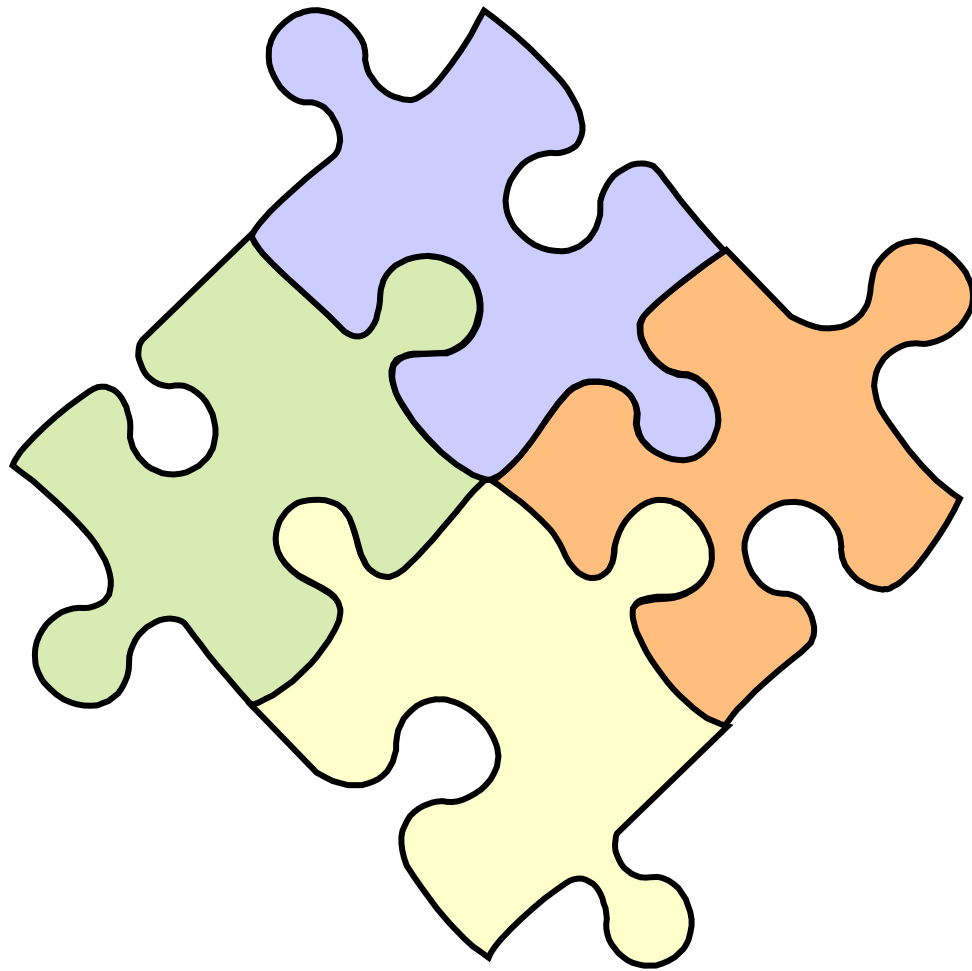
Comments:

H. Use of appropriate handouts, audio visuals and technology:

- ☐ Used training aids to add to learning
- ☐ Handouts were attractive and organized
- ☐ Always faced participants when presenting
- ☐ Overhead / slides were legible

Comments:

# **EVALUATION AND IMPROVEMENT IMPLEMENTATION**





# Training Evaluation

Evaluation is an important component of the quality improvement process. It is necessary to determine the type of training data / information to be collected and plan the evaluation method from the beginning of the training development process. There are numerous methods to evaluate a training program, for example, a questionnaire or survey completed by participants, individual or group interviews, direct observation, test results, etc. After the training event has been conducted, feedback from the participants should be obtained, analyzed, and used to improve the next training event.

For Preparedness Trainings / Courses reviewed through the Tier Review Process, a Training Evaluation Summary Report is required annually or within 60 days of the conclusion of the final training session. (see the *short form template* for Awareness and Operations-level trainings on p.47) BPR staff are compiling the data from the Training Evaluation Summary Reports for reporting progress in meeting the Multi Year Training and Exercise Plan and the grant requirements.

## Steps in the Evaluation Process

1. Design / update the evaluation method and form to provide the type of information needed by both the provider and the presenter.
2. Set a positive expectation for the completion of the form.
3. Administer and collect the forms.
4. Summarize and analyze the evaluation data from the forms.
5. Compile a summary report and review with your supervisor / team.
6. Make improvements to the training event based on evaluations.
7. Address any identified need for additional training.

When continuing education credits are offered for a class, the evaluation form needs to collect specific information. Participant-Level Training Evaluation Form collects a variety of information and meets the requirements for providing continuing education (CE) credits. The form may be adapted to address the specific needs of a training event (i.e., assessing two or more trainers or individual modules); however, it should include the components listed below. More information on continuing education credits can be found in the Additional Resources section.

- Knowledge gained
- Skill gained
- Content
- Applicability
- Implementation issues
- Presentation techniques
- Additional training needs

# Sample Training Evaluation Forms

## Participant-Level

Directions: Please share your opinions to help us improve this training by completing the following.

	A Excellent	B Good	C Average	D Fair	F Unsatisfactory	N/A
	A	B	C	D	E	N/A
1. This program enhanced my knowledge.						
2. This program enhanced my skills.						
3. The content matter appeared to be accurate and current.						
4. The handouts were adequate and useful.						
5. The entire program was meaningful and appropriate.						
6. The time allocated was adequate.						
7. Objective 1 was achieved.						
8. Objective 2 was achieved.						
9. Objective 3 was achieved.						
10. Objective 4 was achieved.						
11. Objective 5 was achieved.						
12. Objective 6 was achieved.						
13. Objective 7 was achieved.						
14. Objective 8 was achieved.						
15. Objective 9 was achieved.						

### Application:

7. I will be able to put this information to use in my workplace. ☐ yes ☐ no

If no, please explain:

8. Based upon what I learned from this session, immediately upon my return to work, I will implement:

9. To fully implement the training, I will need:

### Program Content:

10. What works especially well about this training event?

11. What improvements could be made to make the training event better?

**Teaching Methodologies:**

12. What suggestions do you have to assist the presenter(s) in improving his / her presentation techniques (lecture, group activities, case scenarios, etc.)?

**Overall Assessment:**

13. I would recommend this training event to my peers. ☐ yes ☐ no

**Future Training Needs:**

14. What training event topics would you like to see presented in the future?

Other comments:

## Conference Evaluation Form



Please complete the following evaluations at the end of each session.

Read each statement and circle the response that best reflects your assessment of each session.

Rating scale: 1 = Strongly Agree, 2 = Agree, 3 = Disagree, 0 = Not Applicable

### DAY 1

NOVEMBER 30, 2006

#### Morning Session Activities

		SA	A	D	NA
1	The session was well planned and organized.	1	2	3	0
2	The content was current and accurate.	1	2	3	0
3	The method(s) of presentation was appropriate.	1	2	3	0
4	The presenter(s) demonstrated adequate knowledge of the topic.	1	2	3	0
5	The presenter(s) was effective in conveying information.	1	2	3	0

#### *Plenary Speaker*

#### Take it to the Max: “Building a Quality Organization—the Journey to Baldrige”

Peter J. Newell

		SA	A	D	NA
1	The session was well planned and organized.	1	2	3	0
2	The content was current and accurate.	1	2	3	0

3	The method(s) of presentation was appropriate.	1	2	3	0
4	The presenter(s) demonstrated adequate knowledge of the topic.	1	2	3	0
5	The presenter(s) was effective in conveying information.	1	2	3	0
	<b>Overall Roundtable Evaluation</b>	<b>SA</b>	<b>A</b>	<b>D</b>	<b>NA</b>
1	The session was well planned and organized.	1	2	3	0
2	The content was current and accurate.	1	2	3	0
3	The method(s) of presentation was appropriate.	1	2	3	0
4	The presenter(s) demonstrated adequate knowledge of the topic.	1	2	3	0
5	The presenter(s) was effective in conveying information.	1	2	3	0

## Breakout Sessions

	<b>"A Comprehensive and Collaborative Approach to Problem Solving: The Public Health Administrative Training Project"</b> <b>Panel: Matt Dillon, Gary Mahoney, John Cowart, Ross Dickinson, and Jim Kouba</b>	<b>SA</b>	<b>A</b>	<b>D</b>	<b>NA</b>
1	The session was well planned and organized.	1	2	3	0
2	The content was current and accurate.	1	2	3	0
3	The method(s) of presentation was appropriate.	1	2	3	0
4	The presenter(s) demonstrated adequate knowledge of the topic.	1	2	3	0
5	The presenter(s) was effective in conveying information.	1	2	3	0
	<b>"Getting to the Core with Process Mapping"</b> <b>Roland Martinez</b>	<b>SA</b>	<b>A</b>	<b>D</b>	<b>NA</b>
1	The session was well planned and organized.	1	2	3	0
2	The content was current and accurate.	1	2	3	0
3	The method(s) of presentation was appropriate.	1	2	3	0
4	The presenter(s) demonstrated adequate knowledge of the topic.	1	2	3	0
5	The presenter(s) was effective in conveying information.	1	2	3	0
	<b>"Making Employee Recognition Easy and Fun"</b> <b>Pat Mitchell</b>	<b>SA</b>	<b>A</b>	<b>D</b>	<b>NA</b>
1	The session was well planned and organized.	1	2	3	0
2	The content was current and accurate.	1	2	3	0
3	The method(s) of presentation was appropriate.	1	2	3	0
4	The presenter(s) demonstrated adequate knowledge of the topic.	1	2	3	0
5	The presenter(s) was effective in conveying information.	1	2	3	0
	<b>"Analyzing Data to Drive Business Results"</b> <b>Bob Maderios, Honeywell Corporation</b>	<b>SA</b>	<b>A</b>	<b>D</b>	<b>NA</b>
1	The session was well planned and organized.	1	2	3	0

2	The content was current and accurate.	1	2	3	0
3	The method(s) of presentation was appropriate.	1	2	3	0
4	The presenter(s) demonstrated adequate knowledge of the topic.	1	2	3	0
5	The presenter(s) was effective in conveying information.	1	2	3	0
	<b>“Achieving Goals through Planning and Partnerships” Debbie Reich and Christine Abarca</b>	<b>SA</b>	<b>A</b>	<b>D</b>	<b>NA</b>
1	The session was well planned and organized.	1	2	3	0
2	The content was current and accurate.	1	2	3	0
3	The method(s) of presentation was appropriate.	1	2	3	0
4	The presenter(s) demonstrated adequate knowledge of the topic.	1	2	3	0
5	The presenter(s) was effective in conveying information.	1	2	3	0
	<b>“Start Meeting...NOW”! Using Live Meeting Technology Panel Presentation</b>	<b>SA</b>	<b>A</b>	<b>D</b>	<b>NA</b>
1	The session was well planned and organized.	1	2	3	0
2	The content was current and accurate.	1	2	3	0
3	The method(s) of presentation was appropriate.	1	2	3	0
4	The presenter(s) demonstrated adequate knowledge of the topic.	1	2	3	0
5	The presenter(s) was effective in conveying information.	1	2	3	0
	<b>“Flexible Collaborative Solutions with Sharepoint” Jim Deadman, Mitch Stripling, Janet Martin, and Mechelle McCoy</b>	<b>SA</b>	<b>A</b>	<b>D</b>	<b>NA</b>
1	The session was well planned and organized.	1	2	3	0
2	The content was current and accurate.	1	2	3	0
3	The method(s) of presentation was appropriate.	1	2	3	0
4	The presenter(s) demonstrated adequate knowledge of the topic.	1	2	3	0
5	The presenter(s) was effective in conveying information.	1	2	3	0
	<b>“Tracking the Action Using Trak-it” Armando Oliva, Kathleen Fuentes, Ken Gallagher, Mary Ellis, Cassandra Richburg-Sierra, and Kay Mollenkopf</b>	<b>SA</b>	<b>A</b>	<b>D</b>	<b>NA</b>
1	The session was well planned and organized.	1	2	3	0
2	The content was current and accurate.	1	2	3	0
3	The method(s) of presentation was appropriate.	1	2	3	0
4	The presenter(s) demonstrated adequate knowledge of the topic.	1	2	3	0
5	The presenter(s) was effective in conveying information.	1	2	3	0
<b>Meet, Greet, and Exhibit Displays</b>					
		<b>SA</b>	<b>A</b>	<b>D</b>	<b>NA</b>

The session was well planned and organized.	1	2	3	0
The content was current and accurate.	1	2	3	0
The method(s) of presentation was appropriate.	1	2	3	0
The presenter(s) demonstrated adequate knowledge of the topic.	1	2	3	0
The presenter(s) was effective in conveying information.	1	2	3	0

Overall Conference Evaluation				
	SA	A	D	NA
The content met the stated objectives.	1	2	3	0
The conference met my professional educational needs.	1	2	3	0
Handouts and resources were adequate and useful.	1	2	3	0
The conference was well planned and organized.	1	2	3	0
The meeting rooms were satisfactory.	1	2	3	0
The length of the conference was appropriate.	1	2	3	0
The time allotted for the sessions was appropriate.	1	2	3	0
I benefited from this conference.	1	2	3	0
I received tools and information that can be applied to my job.	1	2	3	0
The exhibit information provides models that I can use in my work unit.	1	2	3	0

#### **OVERALL COMMENTS ON THE CONFERENCE**

What was most useful to you? \_\_\_\_\_  
 \_\_\_\_\_

How may we improve? \_\_\_\_\_  
 \_\_\_\_\_

What topics would you like to see at future conferences? \_\_\_\_\_  
 \_\_\_\_\_

Name of a recommended breakout presenter: \_\_\_\_\_

Name of a recommended plenary speaker: \_\_\_\_\_

Additional Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

- Text found in this document that is highlighted and bracketed is included to provide instruction or to indicate a location to input text.



**Florida Department of Health**  
**Bureau of Preparedness and Response**  
**Training and Exercise Section**

**TRAINING**  
**EVALUATION**  
**SUMMARY REPORT TEMPLATE**

**[Report Date:** should be 60 days after the end of the training or annually June 30]

**[FULL TRAINING NAME]**

**[Training Dates]**



## SECTION 1: TRAINING PURPOSE, AND PARTICIPANT SUMMARY

[This section should contain a brief summation of why the training was conducted.]

[Provide the name, contact information and agency affiliation for everyone that registered and or participated in this training.]

[illegible]

**TOTAL # OF REGISTRANTS/PARTICIPANTS:** \_\_\_\_\_

## SECTION 2: LEARNING OBJECTIVES AND PREPAREDNESS CAPABILITIES

The use of Competency/Capabilities-based planning allows for the design of learning objectives and measurable outcomes that support the FEMA Preparedness Target Capabilities List (TCL).

In the table below, provide:

1. Each Learning Objective addressed in your training
2. The corresponding FEMA Preparedness Capability. Select your applicable preparedness Core Capabilities in this FEMA Guidance document:

<http://www.fema.gov/pdf/prepared/npg.pdf>

Learning Objective	Core Capability (formerly known as Target Capability)

## **SECTION 3: PARTICIPANT FEEDBACK AND PERFORMANCE SUMMARY**

[Provide a summary of the feedback received from participants.]

## SECTION 4: OVERALL STRENGTHS AND GAPS

### Major Strengths

The overall strengths identified during this training are as follows:

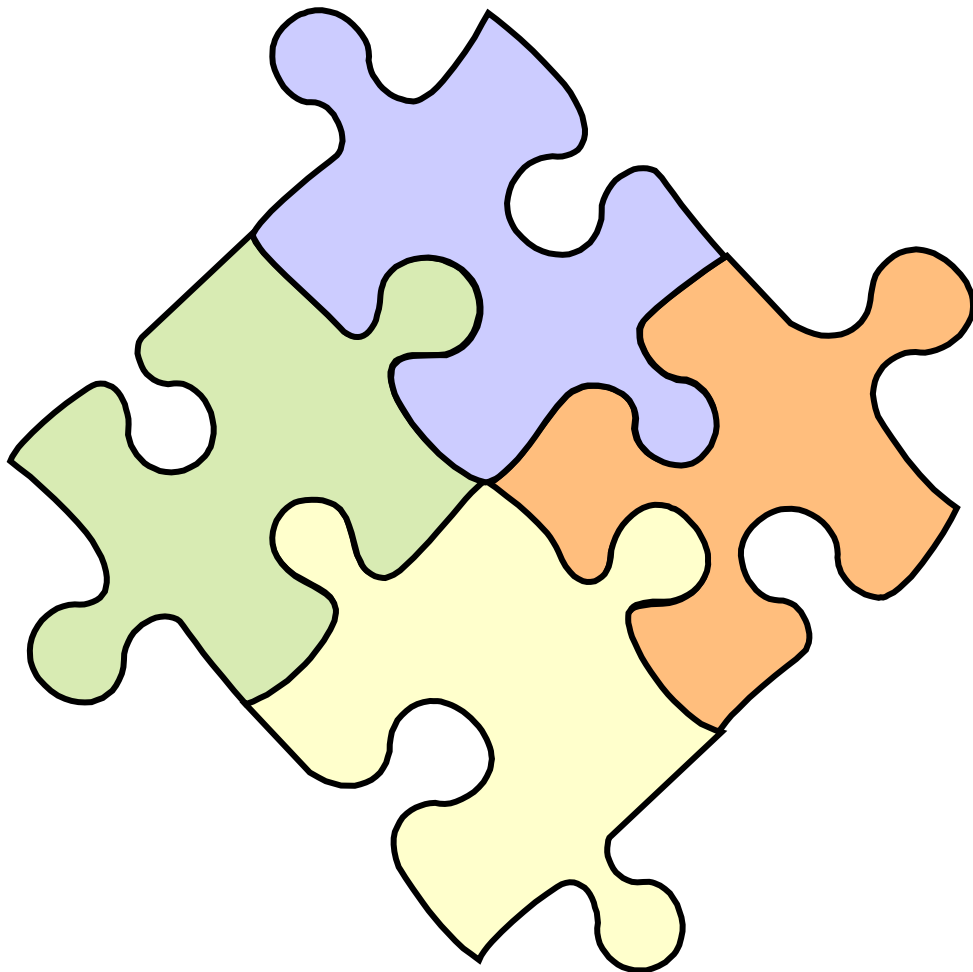
- [Use complete sentences to describe each major strength.]
- [Additional major strength]
- [Additional major strength]

### Major Gaps

Throughout the training, gaps and opportunities for improvement were identified. The overall gaps are as follows:

- [Use complete sentences to state each opportunity for improvement)]
- [Additional area for improvement]
- [Additional area for improvement]

# **ADDITIONAL RESOURCES**



## **Americans with Disabilities Act, Section 508 Compliance Information for Website and Online Classes**

Section 508 of the Americans with Disabilities Act requires equal access to electronic information and services for all individuals regardless of impairment or disability. Information and services must be provided in a format which can be equally accessed by users with disabilities and users without impairment. Electronic information in a text format is widely recognized as a universally accepted format to ensure equal access. When common accessibility techniques and good thoughtful design are incorporated in websites and presentations all users can benefit.

In designing websites and online classes, there are many different types and levels of abilities related to vision, hearing, mobility, dexterity, etc., to take into consideration. Each of these physical impairments presents accessibility issues and modification needs. Most accessibility issues can be addressed through design and formatting techniques.

Some basic practices to employ when designing accessible websites are as follows:

- Design the webpage so every image is accompanied by a text equivalent. Non-sighted users or users with visual impairments typically use a screen reader to access information on a computer. Since pictures or other images cannot be read by a screen reader, it is necessary to design the webpage so every image has text associated with it.
- Use closed captioning with video or include scripts for audio portions. Individuals with hearing impairments may not be able to hear a video posted on a website or in an online class. Providing closed captioning or including a written script for audio portions enables greater participation and understanding of the content.
- Incorporate technical modifications which:
  - allow flexibility with font and color,
  - avoid any animation on a webpage, and
  - allow access with assistive technology tools.

### **Additional Assistance and Information**

- ▶ When developing a website or presentation, please contact the DOH Web Team for assistance with accessibility issues and guidance on compliance – [webmasters@doh.state.fl.us](mailto:webmasters@doh.state.fl.us).
- ▶ The following websites also contain helpful information related to the many aspects of the ADA and accessibility.
  - The U.S. Department of Justice (<http://www.ada.gov>)
  - World Wide Web Consortium (W3C) Web Accessibility Initiative (<http://www.w3.org/WAI/>)
  - Section 508 (<http://www.section508.gov>)
  - U.S. Department of Labor, Office of Disability Employment Policy (ODEP) and other Federal Agency Partners (<http://www.disabilityinfo.gov>)
- ▶ The following checklist was provided to assist employees in developing accessible websites and online tools. It provides additional information about required modifications, but is not intended to be all inclusive. Please contact the DOH Web Team for specific assistance and a comprehensive list of requirements.

## **ADA Compliance Checklist**

### **Section 508, §1194.22**

- ❖ A text equivalent for every non-text element shall be provided (e.g., via "alt", "longdesc", or in element content).
- ❖ Equivalent alternatives for any multimedia presentation shall be synchronized with the presentation.
- ❖ Web pages shall be designed so that all information conveyed with color is also available without color, for example, from context or markup.
- ❖ Documents shall be organized so they are readable without requiring an associated style sheet.
- ❖ Redundant text links shall be provided for each active region of a server-side image map.
- ❖ Client-side image maps shall be provided instead of server-side image maps except where the regions cannot be defined with an available geometric shape.
- ❖ Row and column headers shall be identified for data tables.
- ❖ Markup shall be used to associate data cells and header cells for data tables that have two or more logical levels of row or column headers.
- ❖ Frames shall be titled with text that facilitates frame identification and navigation.
- ❖ Pages shall be designed to avoid causing the screen to flicker with a frequency greater than 2 Hz and lower than 55 Hz.
- ❖ A text-only page, with equivalent information or functionality, shall be provided to make a web site comply with the provisions of this part, when compliance cannot be accomplished in any other way. The content of the text-only page shall be updated whenever the primary page changes.
- ❖ When pages utilize scripting languages to display content, or to create interface elements, the information provided by the script shall be identified with functional text that can be read by assistive technology.
- ❖ When a web page requires that an applet, plug-in or other application be present on the client system to interpret page content, the page must provide a link to a plug-in or applet that complies with §1194.21(a) through (l).
- ❖ When electronic forms are designed to be completed on-line, the form shall allow people using assistive technology to access the information, field elements, and functionality required for completion and submission of the form, including all directions and cues.
- ❖ A method shall be provided that permits users to skip repetitive navigation links.
- ❖ When a timed response is required, the user shall be alerted and given sufficient time to indicate more time is required.

## **Continuing Education Credit**

Continuing education (CE) is required for many health care professionals, including nurses, physicians, health educators and environmental health staff.

### **Procedures for Application**

- A. Evaluate your program offering according to the Standards for Review listed below.
- B. Submit an application with all relevant material to the Office of Public Health Nursing (OPHN), and/or the Division of Disease Control and Health Promotion at least one month prior to the date of the offering.
- C. If the program is approved, you will be notified of the contact hour assignment and content code.
- D. If the program is not approved, you will be notified and the reason(s) will be stated.

### **Standards for Review**

- A. Learner objectives shall:
  - a. Describe expected learner outcomes in behavioral terms that can be evaluated, are attainable, and are relevant to current nursing practice.
  - b. Determine the teaching methodology and plan for evaluation.
- B. Subject matter:
  - a. Shall reflect the professional educational needs of the learner.
  - b. Outline the subject matter that corresponds to the objective.
  - c. Currency and accuracy will be documented by references / bibliography.
  - d. Shall be pertinent to the health care needs of the consumer.
- C. Faculty qualifications:
  - a. List the name of each person involved in preparation and / or presentation of this offering. List current job title to correspond with faculty member.
  - b. Provide evidence of academic preparation and / or experience in the subject matter.
  - c. When subject matter includes nursing practice, a nurse with expertise in the content area must be involved in the planning and instruction.
  - d. If the program includes clinical nursing practice, the nurse faculty supervising the practice must be licensed in Florida and competent in the practice area.
- D. Material and methods shall reflect that:
  - a. The learning experiences and teaching methods are appropriate to achieve the objectives.
  - b. Adult education principles are used in determining teaching strategies and learning activities.
  - c. Sufficient time is allotted for each activity so that the learner may meet the objectives.
- E. Evaluation:
  - a. Evidence shall be presented that participants are given an opportunity to evaluate learning experiences, instructional methods, facilities and resources used.
  - b. Identify methods used to determine that the stated behavioral objectives have been met.
- F. Contact hour criteria:
  - a. All offerings shall be at least fifty (50) minutes in length or one (1) contact hour.
  - b. Increments of twenty-five (25) minutes will be accepted when the offering extends beyond one (1) contact hour.



## Procedures for Processing Forms

### For Nursing:

- A. All participant names should appear on the “master list” in the office holding the training. The original Participant Roster and one copy should be submitted to HPHN containing the names and license numbers of the nurse desiring continuing education contact hours.
  - a. Please note, we are a continuing education provider for RNs, ARNPs, and LPNs. Therefore, only these participants should appear on the roster. (The names of MDs, social workers, etc. should not appear on the roster.)
  - b. The roster must be typed.
  - c. Please be sure to fill out the top portion completely.
  - d. The participant list should be typed in alphabetical order.
  - e. Be sure to include the participant’s license number.
  - f. CERTIFICATES WILL NOT BE ISSUED / VALID TO PARTICIPANTS LACKING LICENSE NUMBERS.
- B. All participants desiring continuing nursing education contact hours should be issued certificates of attendance at the completion of the CE program. Generic certificates may also be issued to other participants who need a record of attendance for other purposes.
- C. Materials should be submitted to HPHN within two weeks after completion of the program (roster, summary of evaluations, and unused / mistyped certificates). All certificates should be accounted for in writing (Example: Received: 12, Issued: 10, Returned: 2).
- D. All materials submitted will be kept on file in the HPHN office for 4 years. We suggest you keep a file in your office of the programs you conduct.

NOTE: Certificates of Attendance are only issued to participants completing the entire program or who have been granted partial credit (partial credit is issued for multi-day training only).

The training must be approved before promotional materials are sent. All promotional materials must contain a statement that will be provided once the training has been approved for CEs. As the CE provider, this office is expected to participate in planning, selection of presenters, and assessment of participant learning and program evaluation.

### For Physicians: About Continuing Medical Education (CME)

AMA PRA Category 1 Credit™ can be applied for through a variety of accredited organizations across the state including University CME departments, the Florida Medical Association (FMA), the Florida Association of Family Physicians (FAFP), and the Florida AHEC Network. These organizations typically charge fees per credit hour or scope of work, which may vary significantly. The Florida AHEC Network is regionally accredited by the FMA while the other associations and departments are nationally accredited providers authorized by the Accreditation Council for Continuing Medical Education.

To work with a local or regionally accredited provider, contact an AHEC representative (<http://flahec.org/locations.asp>) to determine if they can assist you. Their statewide CME webpage ([www.srahec.org](http://www.srahec.org)) has a planning timetable which may be helpful in activity coordination, and has been developed to assist you based on their many years of experience planning and developing CME. In general, whether you are conducting a simple one-hour activity or a multi-day conference, the CME Coordinator you work with will need several weeks with your completed application in order to have it independently reviewed by a committee of physicians responsible for activity oversight. CME activities should be designed and implemented specifically and primarily for a physician audience. CME should not be “added on” to an activity as an afterthought.

**County Health Departments (CHD)**

Some CHD and WIC offices provide contact hours for nurses, dietitians and nutritionists. Contact your local CHD education office for more information.

**For Environmental Health:****Contact the Bureau of Environmental Health Certification Program****Area Health Education Centers (AHEC)**

The mission of AHEC is to improve access to primary health care in medically under-served areas through community –academic educational partnerships designed to recruit, train, and retain community-based health professionals.

Fifteen AHECs cover the 67 counties in Florida. Contact the AHEC which covers the training location for assistance coordinating the training program and/or providing CEs.

Source: *Handbook for Trainers*, Florida Department of Health, September 2003

# Florida Area Health Education Centers (AHEC)

[Home - Florida Area Health Education Centers \(AHEC\) Network](#)

<http://www.flahec.org/directory.asp>

## **Big Bend AHEC**

Glenda Stanley, MA, Executive director  
325 John Knox Rd., Building M, Suite 200  
Tallahassee, FL 32303  
(850) 224-1177 Fax (850) 224-8441

<http://BigBendAHEC.org>

Counties: Bay, Calhoun, Franklin, Gadsden, Gulf, Holmes, Jackson, Jefferson, Leon, Liberty, Madison, Taylor, Wakulla, Washington

## **Central Florida AHEC**

Blake Warren, M.H.S.A., Director  
328 South Central Avenue  
Apopka, FL 32703  
(407) 889-2292 Fax (407) 889-4124

<http://www.cfahec.org>

Counties: Brevard, Hardee, Highlands, Lake, Orange, Osceola, Polk, Seminole, Sumter

## **Everglades AHEC**

Joe Peters, B.S., Director  
5725 Corporate Way, Suite 102  
West Palm Beach, FL 33407  
(561) 640-3620; 800-819-2357 Fax (561) 681-9284

<http://www.eahectobacco.com>

Counties: Broward, Collier, Glades, Hendry, Indian River, Lee, Martin, Okeechobee, Palm Beach, St. Lucie

## **Florida Keys AHEC**

Michael Cunningham, Director  
5800 Overseas Highway, Suite 38  
Marathon, FL 33050  
(305) 743-7111 Fax (305) 743-7709

<http://www.FKAHEC.org>

Counties: Monroe

## **Gulfcoast North AHEC**

Christina Mathis, MBA, Chief Executive Officer  
17819 State Route 52  
Land O'Lakes, FL 34638-6819  
(813) 929-1000 Fax (813) 929-1009

<http://www.gnahec.org>

Counties: Citrus, Hernando, Hillsborough, Pasco, Pinellas

## **Gulfcoast South AHEC**

Edna Apostol, M.P.H., Director  
2201 Cantu Court, Suite 117  
Sarasota, FL 34232  
(941) 361-6602; 800-967-0807 Fax (941) 361-6612

<http://www.gsahec.org>

Counties: Charlotte, Desoto, Manatee, Sarasota

**Miami-Dade AHEC**

Tom M. Gomez , Director  
1200 NW 78th Avenue, Suite 209  
Miami, FL 33126-1817  
(305) 994-9268 Fax (305) 592-3704  
<http://www.mdahec.org>  
Counties: Miami-Dade

**Northeast Florida AHEC**

Clarissa Ortiz, Executive Director  
1107 Myra St., Suite 250  
Jacksonville, FL 32204  
(904) 482-0189 Fax (904) 482-0196  
<http://www.northfloridaahec.org>  
Counties: Baker, Clay, Duval, Flagler, Nassau, St. Johns, Volusia

**Suwannee River AHEC**

Marilyn Mesh, M.Ed., MAC., Executive Director  
14646 N.W. 151<sup>st</sup> Blvd.  
Alachua, FL 32615  
(386) 462-1551 Fax (386) 462-1601  
<http://www.srahec.org>  
Counties: Alachua, Bradford, Columbia, Dixie, Gilchrist, Hamilton, Lafayette, Levy, Marion, Putnam, Suwannee, Union

**West Florida AHEC**

Paige Collier, M.S., Director  
1455 South Ferdon Blvd., Suite B-1  
Crestview, FL 32536  
(850) 682-2552 Fax (850) 682-2521  
<http://www.westfloridaahec.org>  
Counties: Escambia, Okaloosa, Santa Rosa, Fort Walton

***Program Offices*****Florida State University AHEC Program**

Andree Aubrey, L.C.S.W., AHEC Program Director  
Florida State University College of Medicine  
1115 W. Call Street  
Tallahassee, FL 32306-4300  
(850) 645-6439 Fax (850) 645-2859  
<http://med.fsu.edu/HealthAffairs/ahec>

**Nova Southeastern University AHEC Program**

Steven B. Zucker, D.M.D., M.Ed., Program Director  
Associate Dean for Community Affairs  
Nova Southeastern University  
College of Osteopathic Medicine  
3200 South University Drive  
Fort Lauderdale, FL 33328  
(954) 262-1588 Fax (954) 262-3209  
<http://medicine.nova.edu/academics/ahec.html>  
**Centers:** Central Florida AHEC, Everglades AHEC

**University of Florida AHEC Program**

Barbara Richardson, PhD

Program Director

University of Florida AHEC Program

2750 NW 43<sup>rd</sup> St., Suite 102

Gainesville, FL 32606-7486

(352) 273-8530 Fax (352) 392-1022

<http://ahec.health.ufl.edu>

**Centers:** Big Bend AHEC, Northeast Florida AHEC, Suwannee River AHEC, West Florida AHEC

**University of Miami AHEC Program**

Michel Dodard, MD

Program Director

University of Miami School of Medicine

P.O. Box 016700 (R-700)

Miami, FL 33101

(305) 243-2847 Fax (305) 243-2888

**Centers:** Miami-Dade AHEC, Florida Keys AHEC

**University of South Florida AHEC Program**

Anne Maynard, MPH

Program Director

University of South Florida

Area Education Health Center (AHEC)

College of Medicine, MDC 76

12901 Bruce B. Downs Blvd.

Tampa, FL 33612-4799

(813) 974-3507 Fax (813) 974-3605

<http://health.usf.edu/ahec>

**Centers:** Gulfcoast North AHEC, Gulfcoast South AHEC

# Florida Department of Health

## A Guide To Planning\*\* A Satellite Broadcast or Video Production



Office of Workforce Development  
Tallahassee, Florida 32399-0700

**\*\*Follow this link to access “A Guide to Planning Satellite Broadcast or Video Production”:**

**<http://dohiws/Divisions/wfd/PDFs/revisedvideoteleconfplan.pdf>**

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### Additional Internet Information

Adult Learning Information and Techniques: Search key words: "adult learning," "adult learning techniques," "how adults learn"

Evaluation Information: Search key words: "training evaluation," "evaluation techniques," "evaluation," "evaluation types"

Instructional Systems Design and the ADDIE Model: Search key words: "ADDIE," "instructional design," "instructional systems design," "ISD model"

Objectives: Search key words: "learning objectives," "training objectives," "objectives"

Questioning Techniques: Search key words: "training questioning techniques," "questioning techniques," "questioning"

Training Ice Breakers and Games: Search key words: "training ice breakers," "training games"

Training Needs Assessment: Search key words: "training needs assessment," "needs assessment"